



# Meat and Livestock Australia Packaging Playbook

# About The Research

We set out to identify what matters most to consumers purchasing beef and lamb to create **best practice guidance on red meat packaging.**

The findings presented in this paper are based on:

- **60 qualitative self-led shopper videos**, allowing us to observe system 1 behaviours
- A quantitative survey comprised of a **national sample of 3,025 Australians aged 18-64**

To participate in this study, respondents had to have **purchased beef or lamb within the 4 weeks prior to the research.**

This research was conducted by Nature in December 2024.

**Nature:**

This research was conducted in accordance with ISO 20252: 2019 and ISO 27001:2013



# The packaging elements that we explored



Meat visibility



Provenance Claims



Health Indicators



Information on Fat Content



Sustainability Claims



Recipe and Cooking Information



Guidance on Occasions



Colour Cues

# Prioritisation of the different packaging elements

## The critical packaging elements *Must haves*



Meat visibility



Provenance Claims



Health Indicators



Information on Fat Content

## The differentiating packaging elements *Nice to haves*



Sustainability Claims



Recipe and Cooking Information

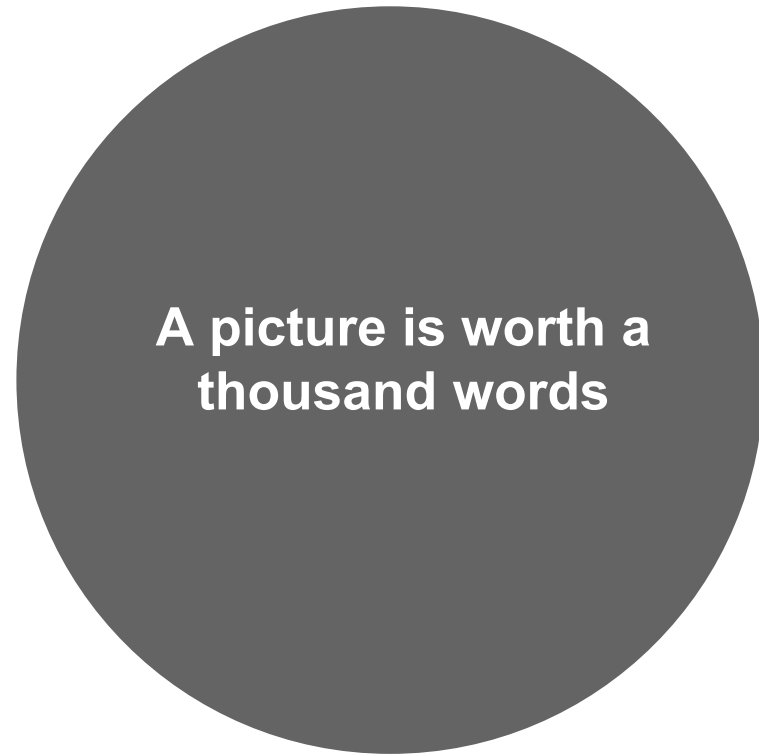


Guidance on Occasions



Colour Cues

Whilst we explored a number of specific packaging elements, 2 key themes emerged:





# The **critical** packaging elements



Meat visibility



Provenance Claims



Health Indicators



Information on Fat Content

A stack of several vacuum-sealed packages of meat, likely beef, resting on a wooden cutting board. The packages are wrapped in clear plastic, showing the marbled red meat and white fat. The cutting board is placed on a light-colored, textured surface.

**Meat visibility**

There is a preference and slightly higher purchase intent for the pack that shows more of the actual meat.

This pack also performs stronger on quality and freshness perceptions, though the pack that depicts the cooked final product performs stronger on taste perceptions.

### Mid visibility pack



**58%**

Preference for this pack

**89%**

Likely to buy

### Low visibility pack



**42%**

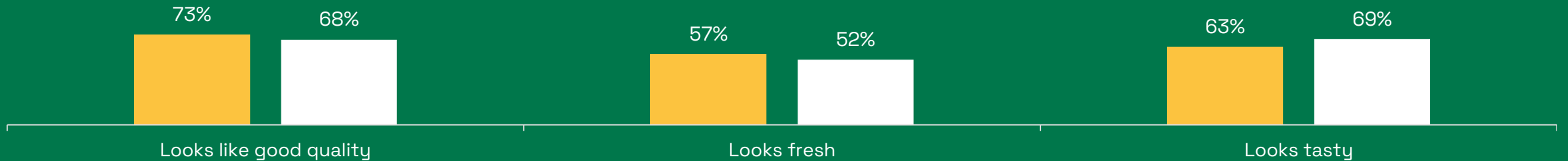
Preference for this pack

**86%**

Likely to buy

### Perceptions of each pack

■ Mid visibility ■ Low visibility

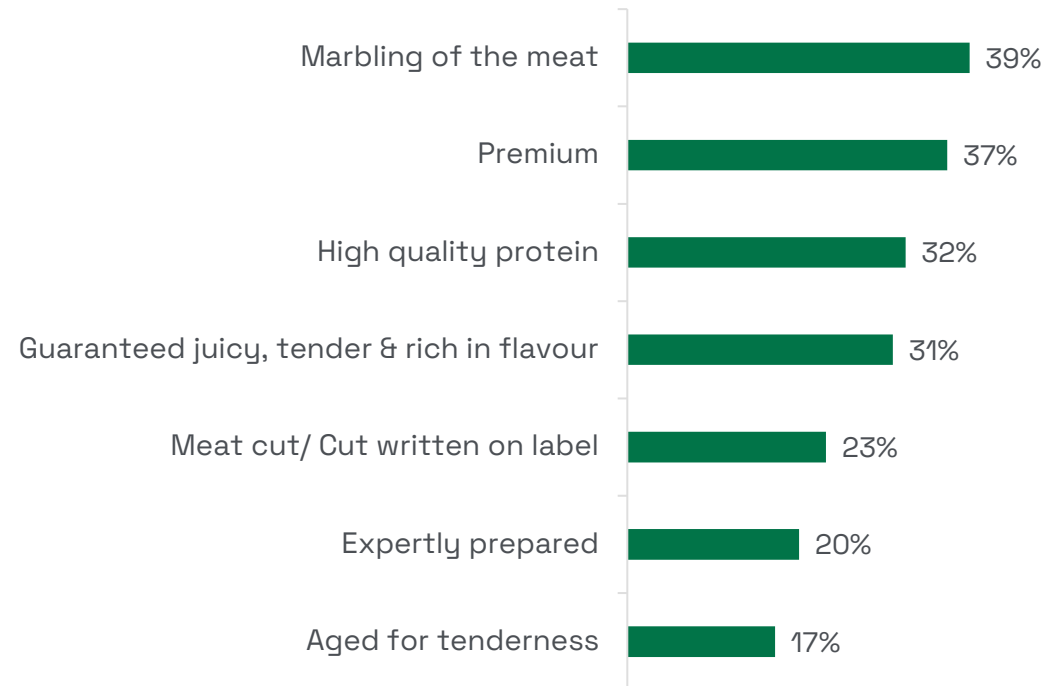


When asked to assess a pack, the marbling of the meat itself is most liked alongside premium, quality protein and flavour call outs.

This again highlights the importance of showing the meat to instil a perception of high quality and a reason to pay a price premium.



### Top Indicators of Quality



# Vacuum packs are overall most preferred with, the option with cardboard tray most liked.

Vacuum packs provide assurances that the meat stays fresher for longer and has extended shelf life.

## Pack preference Top 3



**34%**  
Vacuum pack with cardboard tray



**24%**  
Vacuum pack with plastic tray



**23%**  
Vacuum pack with no tray

## Reasons for preference – vacuum sealed



The visual appeal of meat is crucial, and consumers prefer packaging that maximises visibility.

## Thought Starters:

### Prioritise meat visibility

Opt for pack designs that showcase as much of the meat as possible, as this reassures consumers about quality and freshness.

### Striking a balance

Use concise, well-placed labels that provide essential information without obstructing the view of the meat.

### Leverage vacuum pack formats

Focus on vacuum packaging, especially those with cardboard trays, as they enhance appeal, preserve freshness, and extend shelf life.

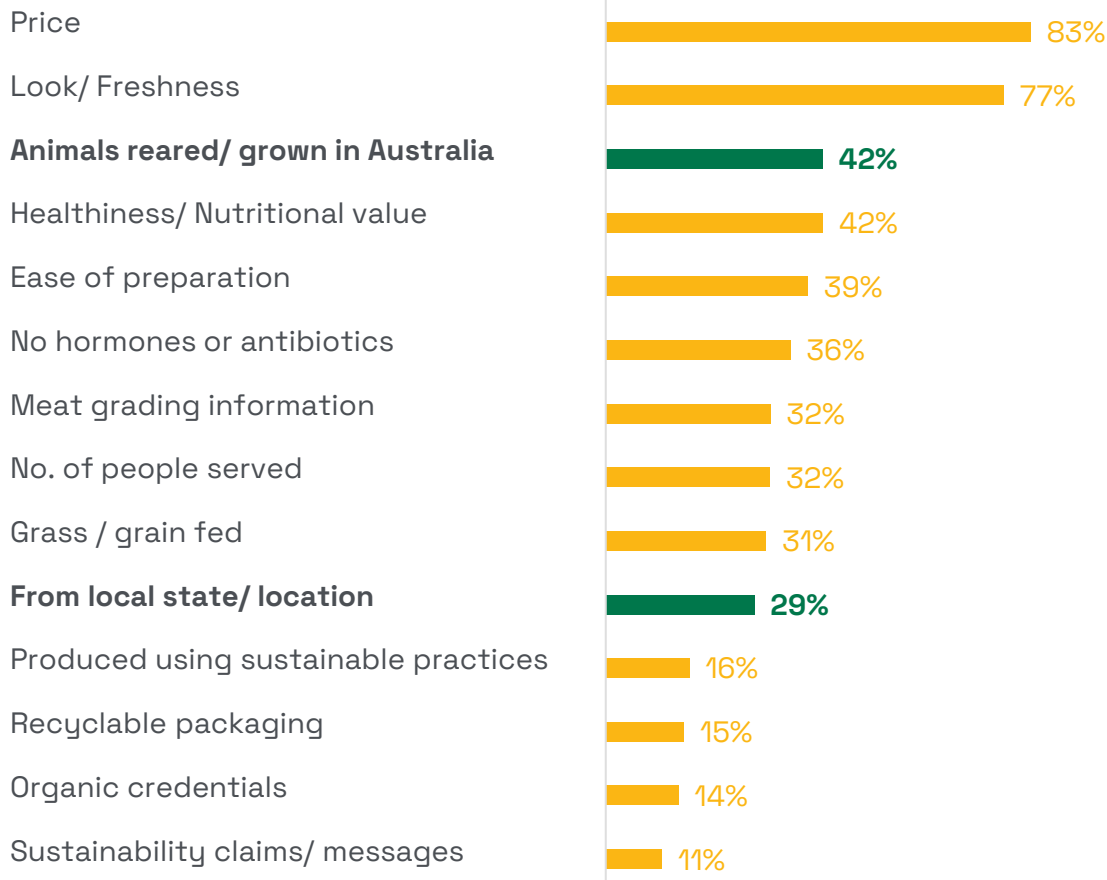




**Provenance**

# Provenance plays a pivotal role in shaping consumer perceptions of the quality of red meat.

## Purchase Drivers (% ranked in top 5)



## Why is provenance important?



**Supports local farmers / Australian farming industry (75%)**



**The meat will comply with Australian standards (67%)**

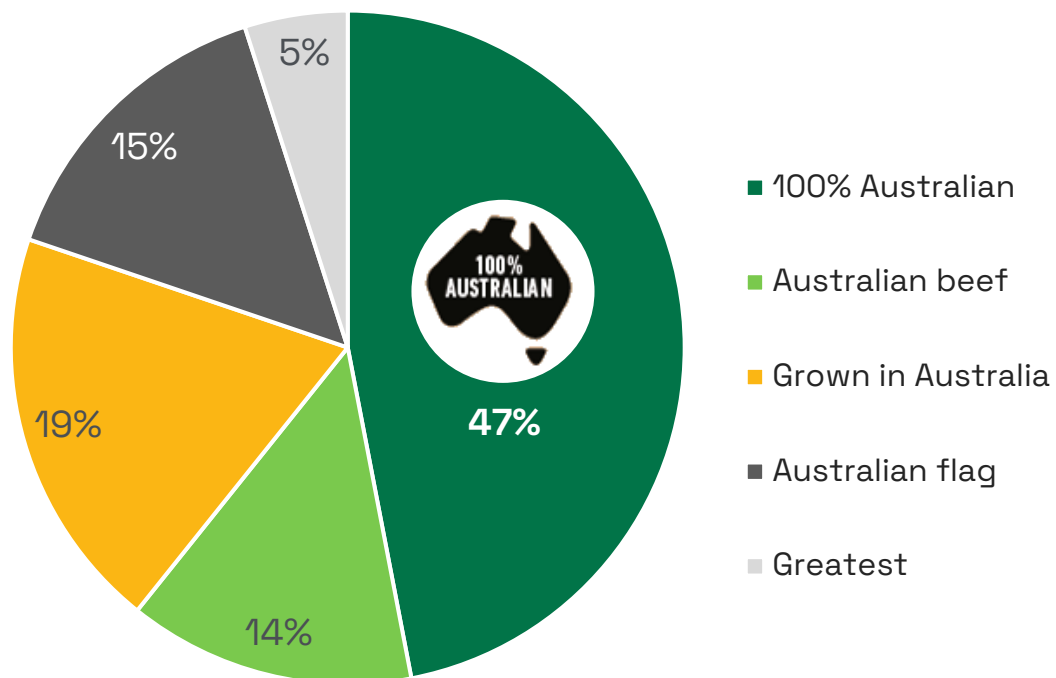


**Reassures me of the meat's freshness and quality (60%)**

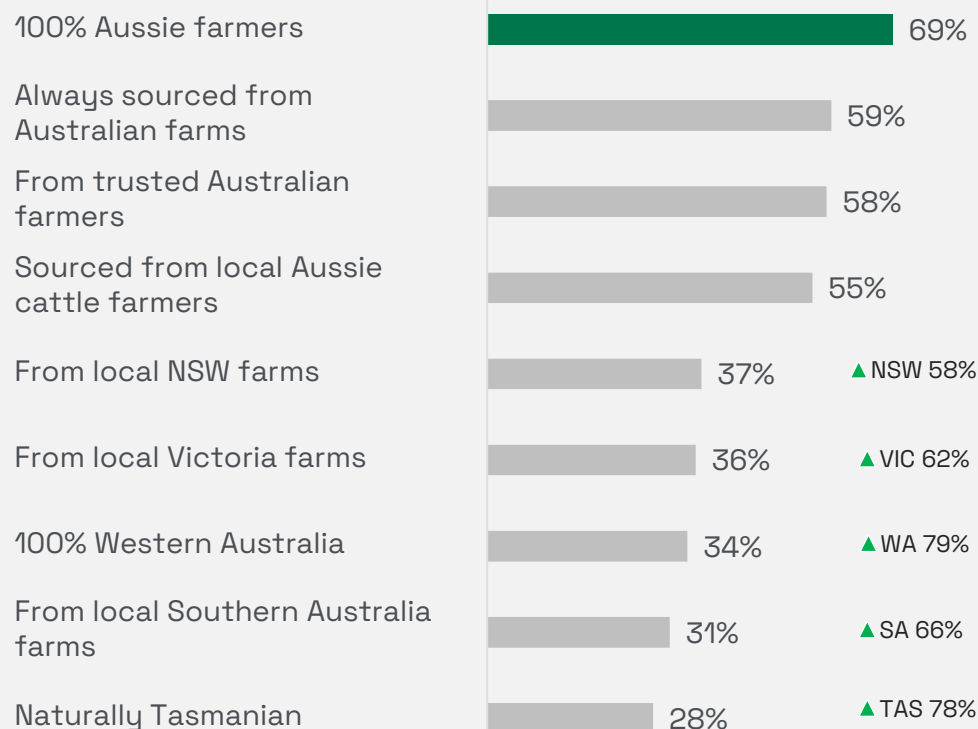
# Whether communicated in text or imagery, the '100% Australian' message should be prioritised on pack.

Whilst the national-level claim has the best appeal overall, state-based claims resonate strongly in the given state – highlighting the more local, the better.

## Origin Logo Preference



## Claim Preference | % Very Appealing



The more local the better!

**Provenance strongly influences perceptions of quality and freshness.**

## Thought Starters:

### **Prioritise national claims**

Dial up provenance claims like “100% Australian” on packaging to maximise appeal across regions.

### **Leverage the 100% Australian logo**

Use this logo consistently to reassure and reinforce quality and ethical perceptions.

### **Potential for state specific claims**

Use state-specific claims within each given state where feasible.

### **Enhance ‘on pack’ messaging**

Include a clear guarantee of Australian sourcing and consider adding storytelling elements about farmers.



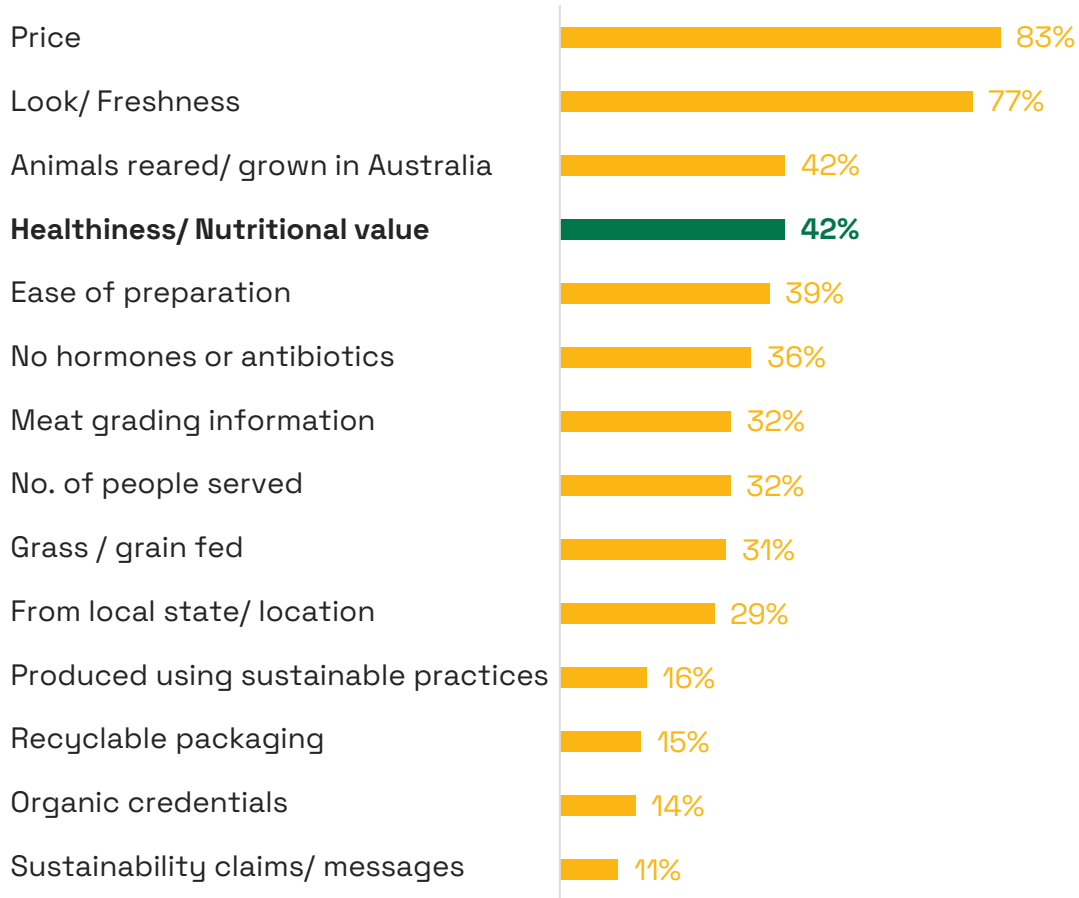


# Health indicators

# Healthiness and nutritional value are important in driving purchase decisions.

This is especially true of younger consumers aged 18-39 who are most interested in health markers.

## Purchase Drivers (% ranked in top 5)



## Why healthiness/nutritional value is important?

(Top 3)



To ensure my family have healthy meals (54%)



To enjoy a balanced diet which includes meat (52%)



To know exactly what I am eating (50%)

## What health markers are consumers looking out for?

(Top 3 Most/highly important)



Great source of high-quality protein (48g per 200g serving raw weight) for muscle health (72%)



Good source of Vitamin B12 for brain / nerve function (69%)



Source of 12 essential nutrients recommended for good health (67%)

# Packs with more information on protein result in slightly higher appeal and likelihood to purchase.

The high levels of protein are especially compelling for those aged 18-39.

## Premium Meat Comparison

**A** 88% likely to purchase



▲ 44% of 18-39yrs 'very likely' to purchase

**B** 92% likely to purchase



▲ 44% of 18-39yrs 'very likely' to purchase

*Naturally high in protein*

## Mainstream Meat Comparison

**A** 89% likely to purchase



▲ 50% of 18-39yrs 'very likely' to purchase

**B** 91% likely to purchase



▲ 47% of 18-39yrs 'very likely' to purchase

*Great source of high-quality protein*

## Perceptions that pack B performs stronger on



**High in protein**  
(+14% vs pack A)



**Nutrition I need**  
(+4% vs pack A)



**Good for you**  
(+3% vs Pack A)

## Perceptions that pack B performs stronger on



**High in protein**  
(+6% vs pack A)



**Good for you**  
(+3% vs Pack A)

Healthiness is a key factor driving meat purchases, especially among younger consumers.

## Thought Starters:

### Focus on protein

Highlight the protein content prominently in product packaging and marketing efforts, as it is an important driver in purchase decisions.

### Broaden health claims

Incorporate additional health benefits such as Vitamin B12 and other essential nutrients in communications to enhance the perceived value of meat products.

### Part of a balanced diet

Ultimately, these communications should also reinforce the importance of including meat as part of a balanced diet.





**Fat content**

# Packaging that features fat content information is favoured over packaging that does not include this detail.

More importantly, the pack including information on fat content is perceived as significantly more informative and seen to provide the nutritional information needed.

**Includes fat content**

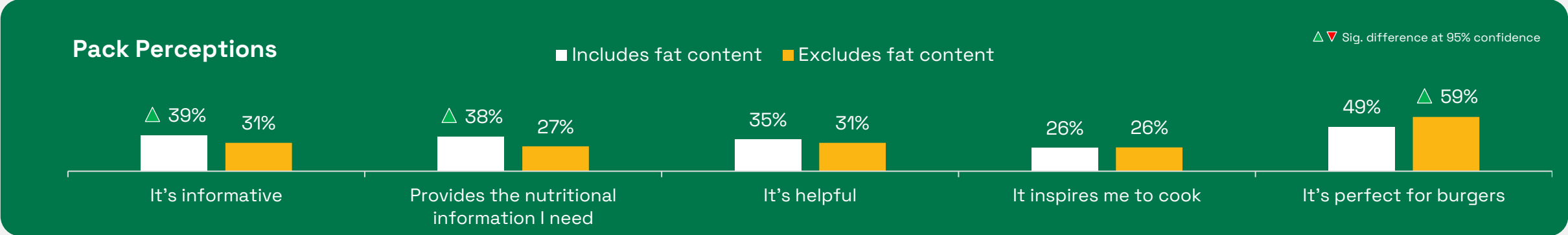


**69%**  
Preference

**Excludes fat content**



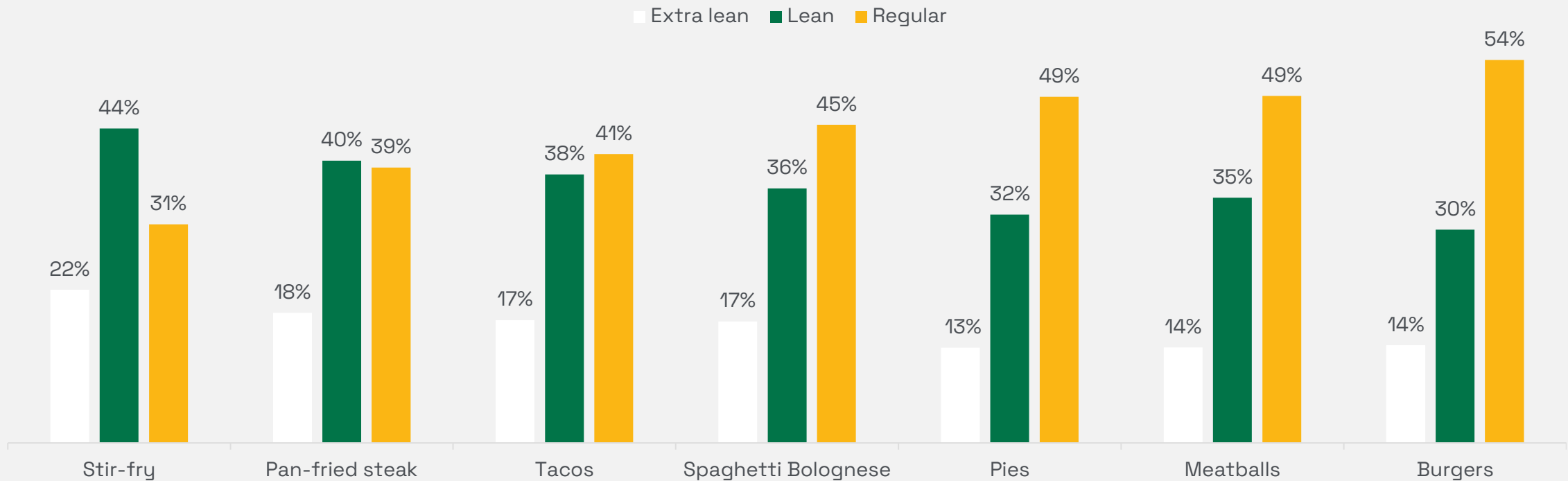
**31%**  
Preference



# Beef with regular fat content is the most desired across most food types.

However, extra lean/ lean beef is significantly more likely to be chosen for stir fries, and lean beef for pan-fried steak.

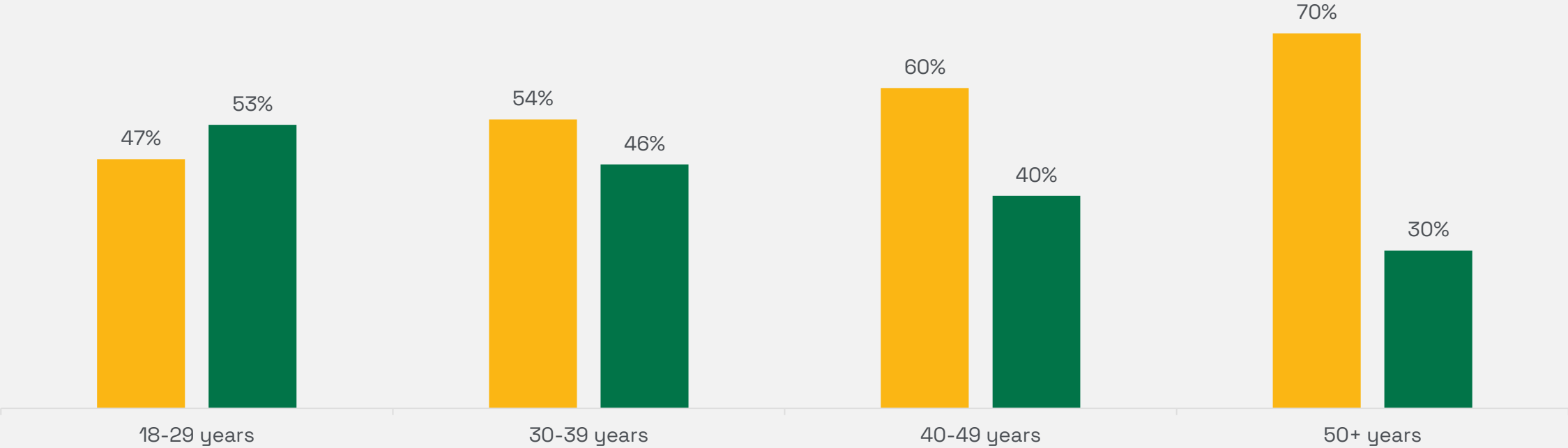
## Required Fat Content



As people get older, they increasingly value taste of the meat they're purchasing over its nutritional value.

Taste vs Nutrition | By age group

■ The taste of the meat ■ The nutritional value of the meat



Consumers prefer packaging that clearly highlights fat content, with transparency aiding informed choices.

## Thought Starters:

### Enhance packaging transparency

Clearly label fat content on packaging to provide essential nutritional information, appealing to consumer demands for clarity. However, ensure there is a balance in terms of messaging provided on pack, so it is not overwhelming.

### Highlight versatility

Emphasise the application of different meat types for various dishes, showcasing lean options for health-conscious meals and higher-fat choices for indulgent recipes.

### Educate on flavour and nutrition

Consider ways in which to convey how fat content impacts flavour and cooking outcomes, helping consumers make informed decisions aligned with their taste preferences / recipes.

### Target different age groups

There's potential to tailor marketing strategies that address the different preferences of age groups, promoting nutritional value to younger consumers while focusing on taste for older demographics.



**A note on justifying a price premium**

The main drivers for consumers to spend more are split largely across key factors of quality, price/promotions, ethical/local information, and freshness/packaging.

## Quality

Quality comes through as the greatest driver of increased spend, with a focus on premium cuts, fat content, organic meat and its freshness.

*“Quality meat”*

*“Quality assurance, freshness indicators”*

*“The quality of meat”*

*“Organic, grass-fed”*

## Price & Value

Customers are inclined to spend more when they feel they’re getting value for money with comments related to price, promotions and discounts.

*“Hot prices and great quality”*

*“If it was half price or a lot of discount”*

*“Price and value”*

*“Better pricing”*

*“Promotions or discounts available”*

## Provenance & Ethics

Knowing meat is produced ethically and sourced locally will encourage increased spend.

*“Ethical, grass-fed, proof of ethicality and from Australia”*

*“Organic farming”*

*“100% Australian lean meat and grass-fed beef or lamb”*

*“How ethical the meat is”*

*“Grass-fed, hormone-free, and ethically sourced beef or lamb”*

## Freshness & Packaging

Comments on the packaging itself, design and functionality, freshness indicators and serving size and nutritional information.

*“Knowing the freshness is guaranteed”*

*“More information about what the fat content is”*

*“Pre-packaged fresh meat”*

*“Fat content including saturated fats and health values”*

Provenance, meat quality, freshness and premium classifications all encourage higher spending on meat.

## Thought Starters:

### Provenance matters

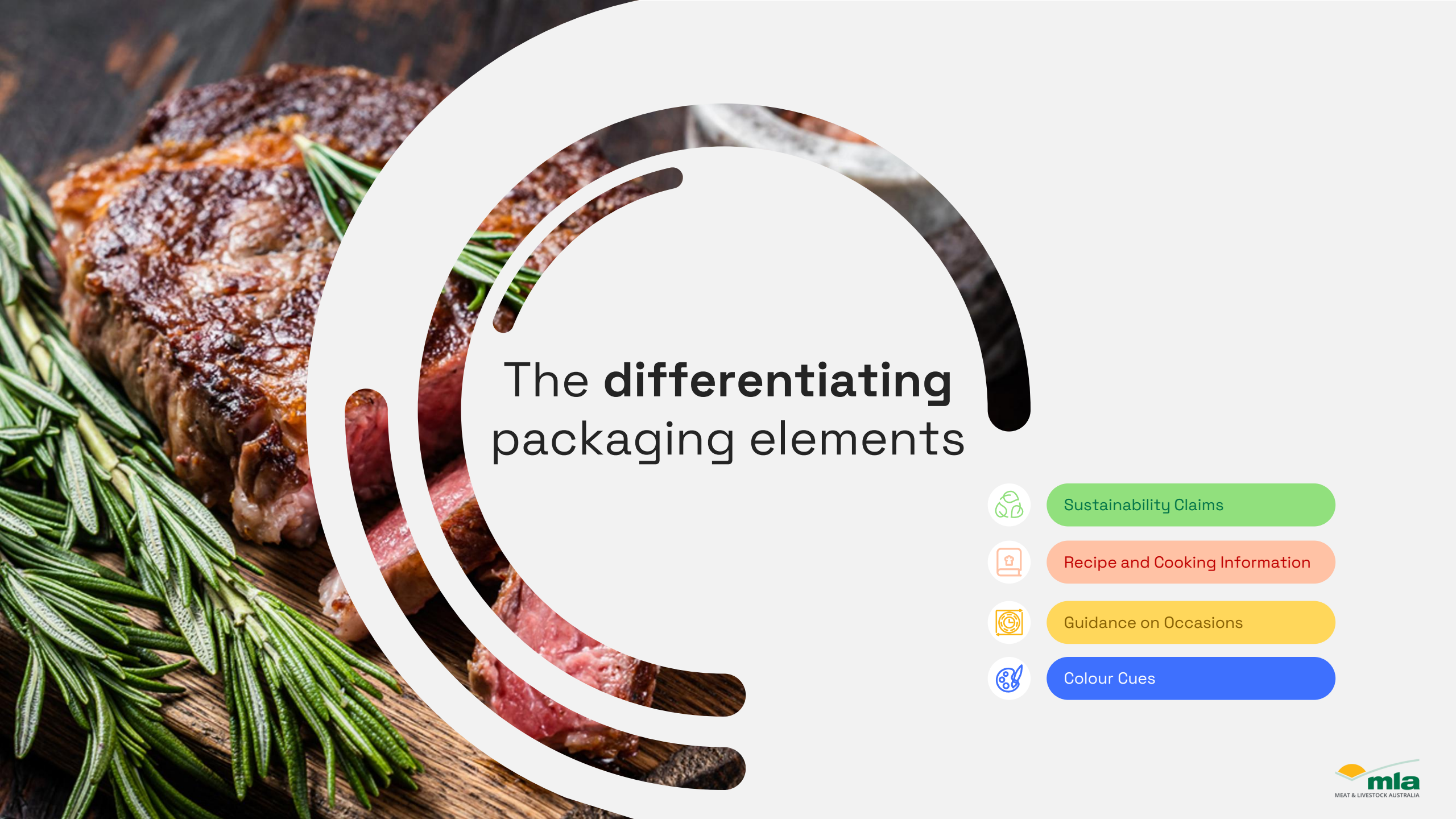
Alongside other claims, Aussie Beef continues to be a main contributor to premium quality perception.

### Certified instils confidence

Calling out specific certification and grading claims enhances perceptions of quality.

### Award winning influence

Canstar awards rank highly in providing further confidence and instilling premium perceptions.



# The differentiating packaging elements



Sustainability Claims



Recipe and Cooking Information



Guidance on Occasions



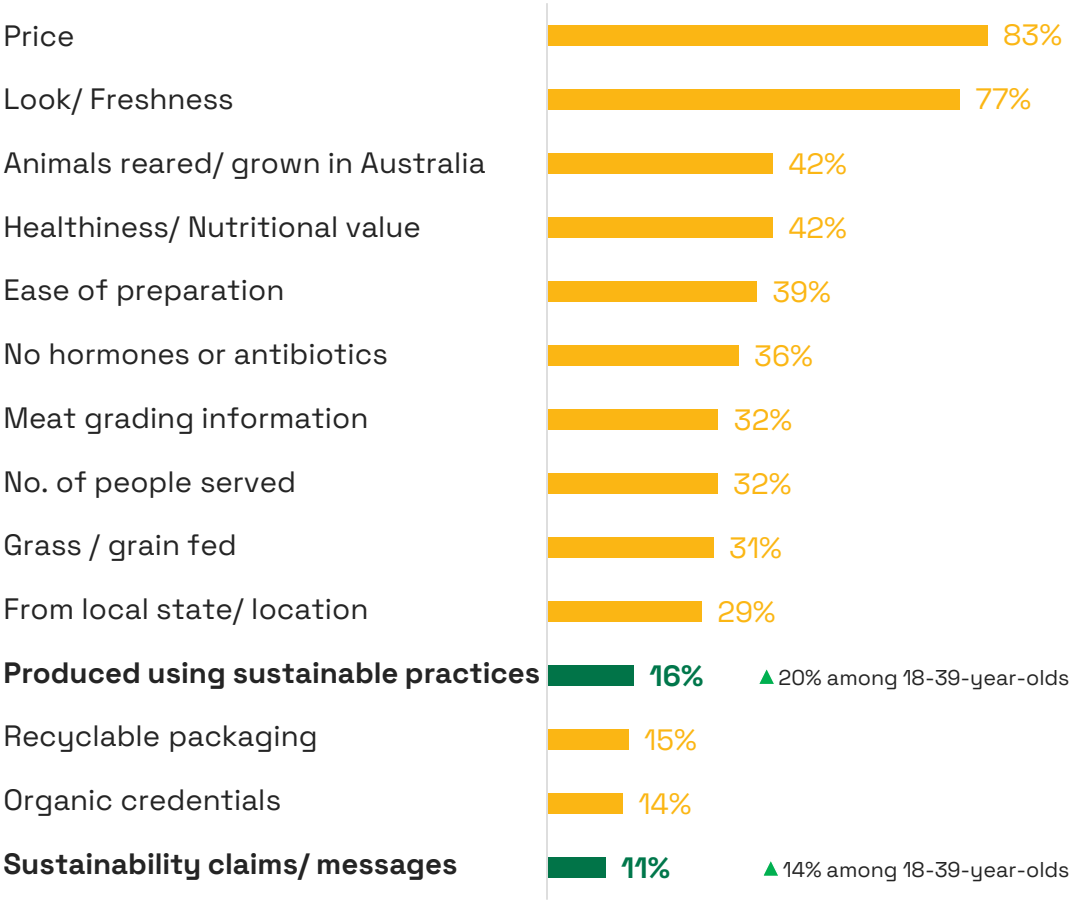
Colour Cues



# Sustainability

# While being a less impactful purchase driver, sustainability is important to a small proportion of consumers who skew younger.

## Purchase Drivers (% ranked in top 5)



## Why sustainable practices are important? (Top 3)



**Free from chemicals and other artificial inputs**  
(74%)



**The animal has had a better life**  
(44%)



**Protecting the future of our planet**  
(43%)

## Which sustainability claims are most important? (Very/most important)



**Pure natural taste from sustainable farming**  
(75%)



**High quality protein supporting a healthier planet**  
(74%)

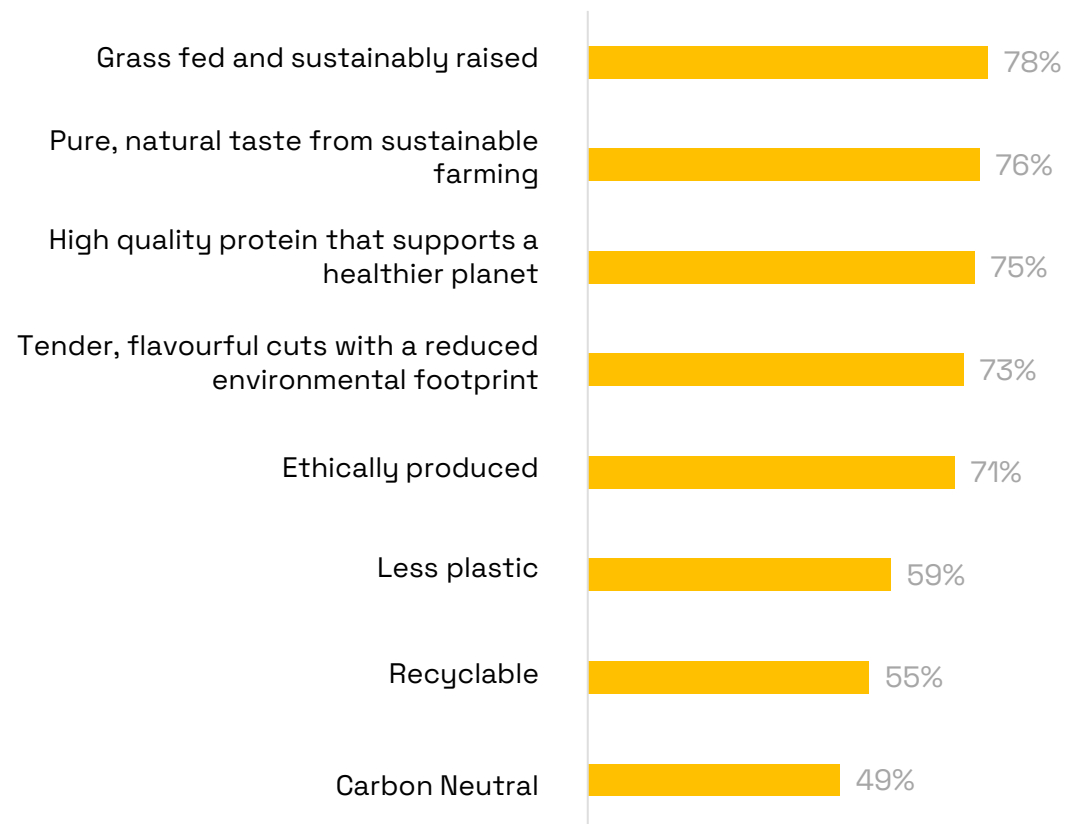


**Tender, flavourful cuts with a reduced environmental footprint**  
(73%)

# Preference for clear sustainability guarantees on packaging that speak to direct consumer benefits.

For sharing sustainability information, stickers and text descriptions are the most appealing.

## Appeal of Sustainability Claims (% Very/Most appealing)



## Preferred Sustainability Initiatives

**63%**

Say they would like to see a **'Sticker on pack, that guarantees sustainability credentials'**

**47%**

Say they would like to see a **'Text description on pack, that describes sustainability initiatives'**

# The paddock imagery enhances sustainability perceptions, boosting appeal and purchase intent.

This imagery is also more strongly associated with a range of other aspects such as being better quality, more premium, and better tasting.

## Plain imagery



**40%**

Very appealing

**38%**

Very likely to purchase

## Paddock imagery



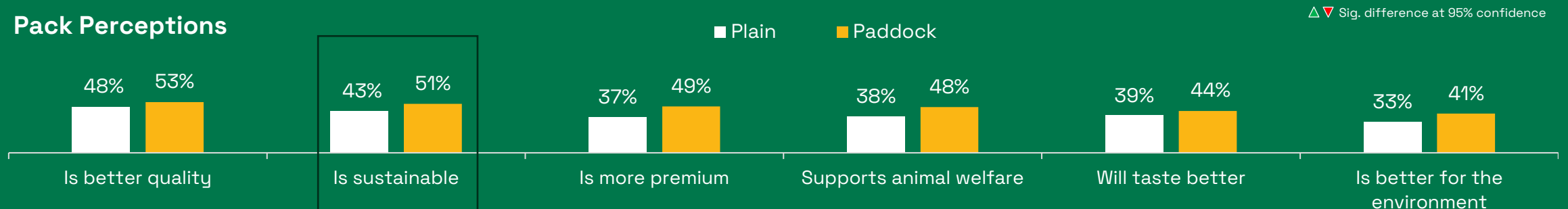
**53%** ▲

Very appealing

**47%** ▲

Very likely to purchase

## Pack Perceptions



**Sustainability plays a secondary role in purchase decisions, though it resonates more with consumers aged 18-39.**

## **Thought Starters:**

### **Promote green imagery**

Enhance product appeal by incorporating agricultural imagery that implies the produce is natural and sustainably sourced.

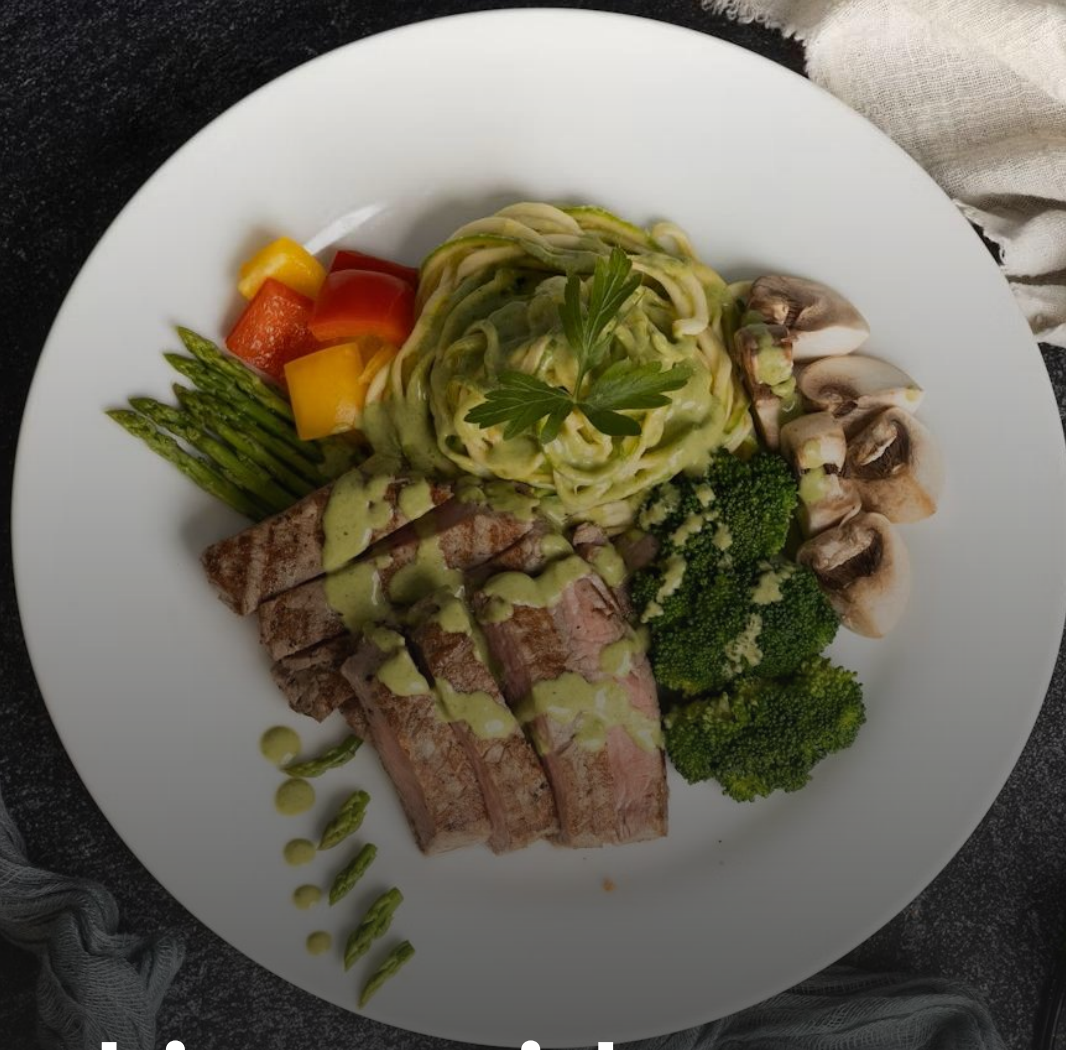
### **Focus on sustainable sources**

Focus on compelling sustainability messages, such as high-quality protein and grass-fed sources that speak more to direct consumer benefits.

### **Clear sustainability guarantees**

Add visible stickers to packaging to clearly communicate sustainability credentials and build consumer trust.

# Cooking guidance



# There is a clear preference for the pack showing cooking information over the one that doesn't.

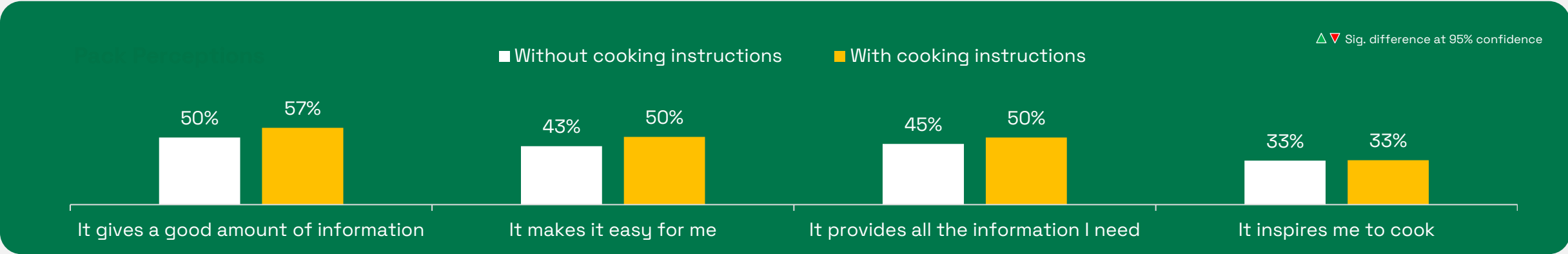
The pack is also seen to give a better amount of information and make it easier for the consumer than the pack without.

**Without** cooking instructions

**24%**  
Preference

**With** cooking instructions

**76%**  
Preference



Shoppers are open to influence at shelf, especially when provided with easy and practical information.

## Thought Starters:

### Highlight serving / portion size

Focus on providing serving/portion size and recommended cooking time prominently on the pack, as these are the most desired information elements.

### Ensure easy-to-use information

Ensure cooking instructions are visually engaging and easy to follow, emphasising convenience and confidence in meal preparation.



Meal inspiration

Consumers are habitual with relatively few saying they frequently try new recipes at home. Their main reason for not doing so is due to repeating tried and tested recipes.

### Attitudes (% Strongly Agree)



### Reasons for not trying new recipes at home...

-  I have tried & tested recipes that I repeat **(44%)**
-  I don't have enough time **(34%)**
-  I don't feel confident cooking something new **(32%)**
-  I don't enjoy cooking **(22%)**
-  I wouldn't know what to cook or how **(20%)**

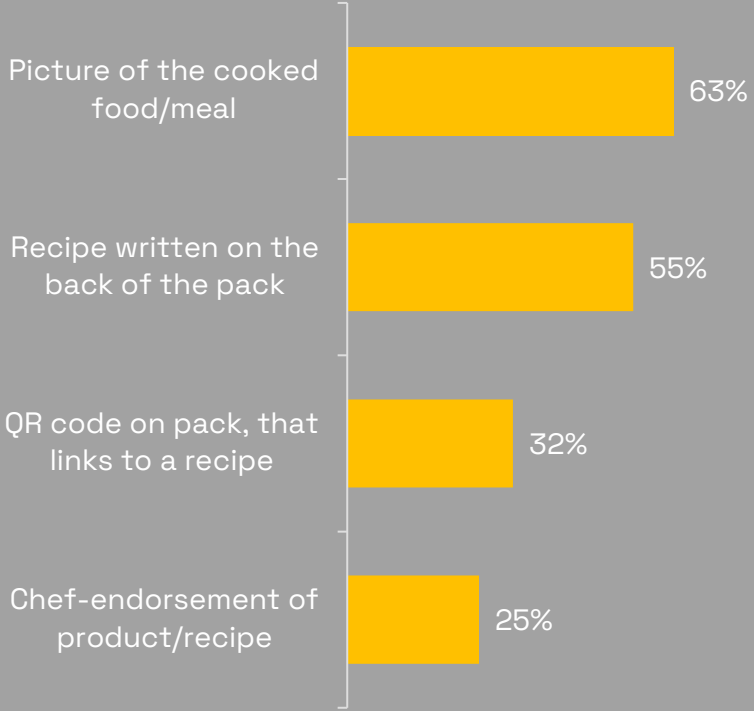
Opportunity exists to provide more inspiration on pack for cooking, with pictures of the meal being most desired.

Examples of current range shown

**26%** Only 1 in 4 **strongly agree** that the current range of packs 'include recipe inspiration'




Preferred ways of sharing cooking Information



# Consumers show a strong preference for packs displaying recipe inspiration.

They are also significantly more likely to buy these packs, with meal images highly desired for cooking inspiration.


**Without Recipe**



**13%**  
Preference

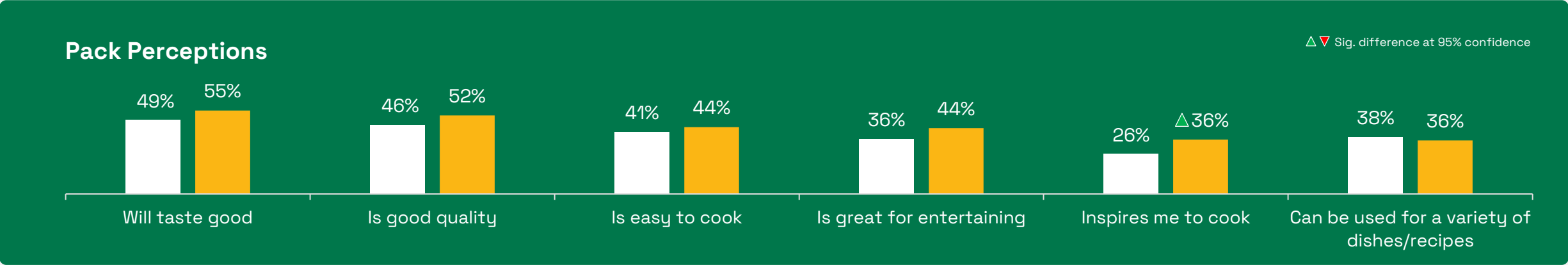
**74%**  
Likely to buy (very/somewhat)

**With Recipe**



**87%** ▲  
Preference

**82%** ▲  
Likely to buy (very/somewhat)



There is an opportunity to provide shoppers with meal inspiration given the increased appeal it offers.

## Thought Starters:

### Provide inspiration

Incorporate simple, appealing recipes directly on the packaging to capitalise on shoppers' openness to meal inspiration.

### Highlight end product

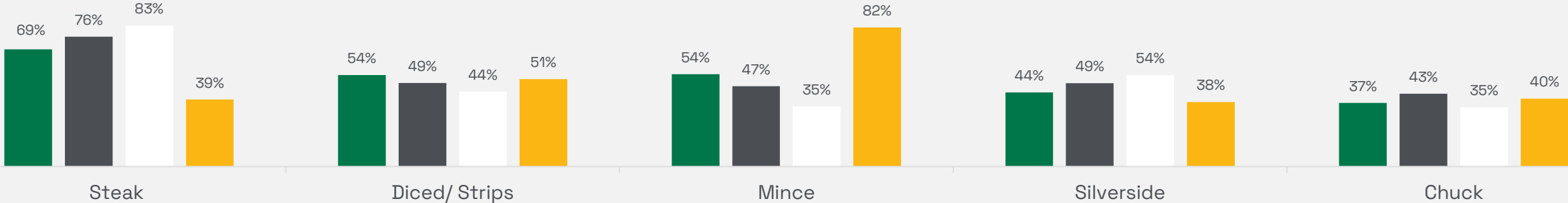
Prominently display high-quality images of the cooked dish on packaging, as this is the most desired way for shoppers to gain cooking inspiration, helping shoppers imagine the product as part of their meals.



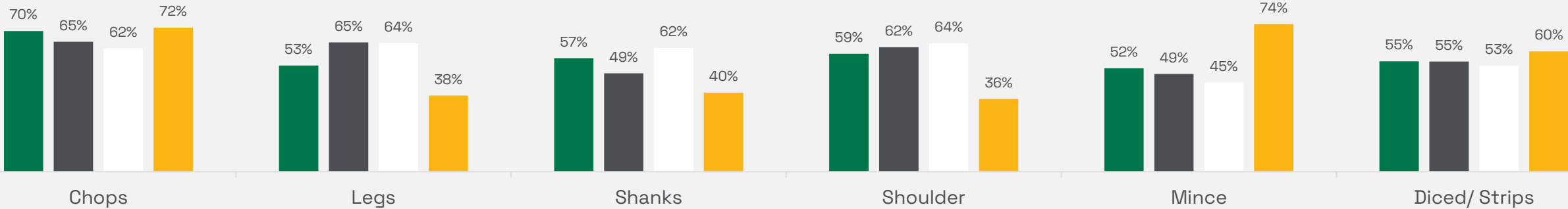
**Aligning products with occasions**

# Specific types of meat are selected based on the intended dining occasion, with some proving more versatile than others.

## Beef chosen for each meal



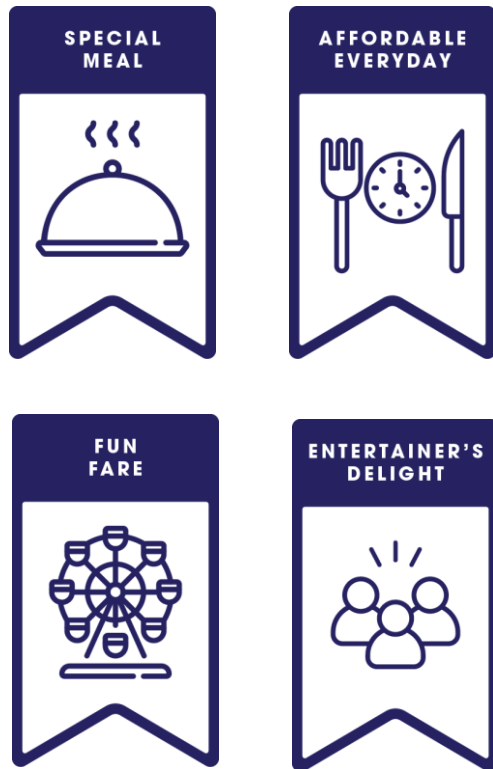
## Lamb chosen for each meal



- Fun weekend or casual treat meal
- Entertaining at home
- A special meal
- A quick and affordable weekday meal

Stickers are seen by the majority as appealing and helpful and would result in almost half being more likely to buy a product .

### Stickers Tested



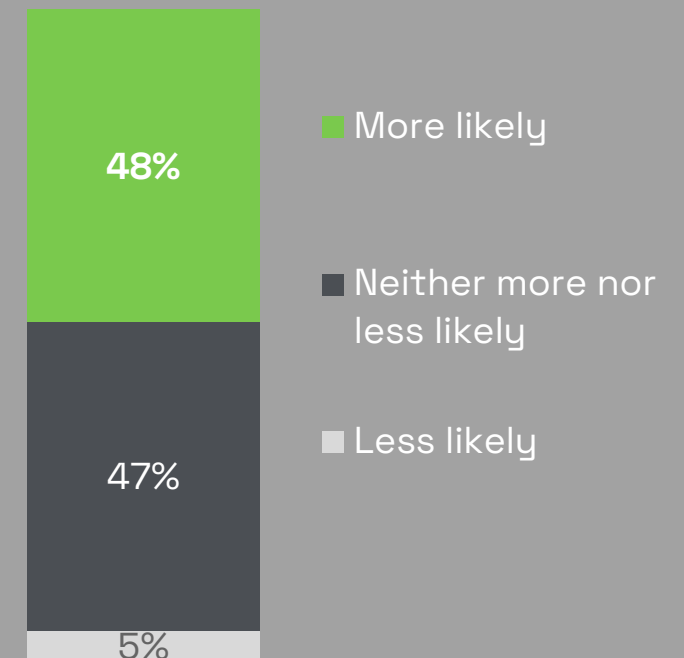
**85%**

Believe the stickers are very or somewhat **appealing**

**84%**

Believe the stickers are very or somewhat **helpful**

### Sticker impact on likelihood to purchase



Nearly half of consumers are more likely to purchase cuts with occasion-specific packaging.

## Thought Starters:

### Implement occasion-based labels

Clearly label packaging with suggestions for specific meal occasions to aid in decision making on specific cuts for occasions

### Promote versatility of different cuts

Highlight versatile cuts like mince, diced beef, or chops for quick meals and position premium cuts such as beef steaks or lamb legs as indulgent choices for special occasions.

### Provide cooking guidance

Including simple recipe ideas or QR codes linking to cooking tips tailored to each cut and occasion can broaden consumers' choices.

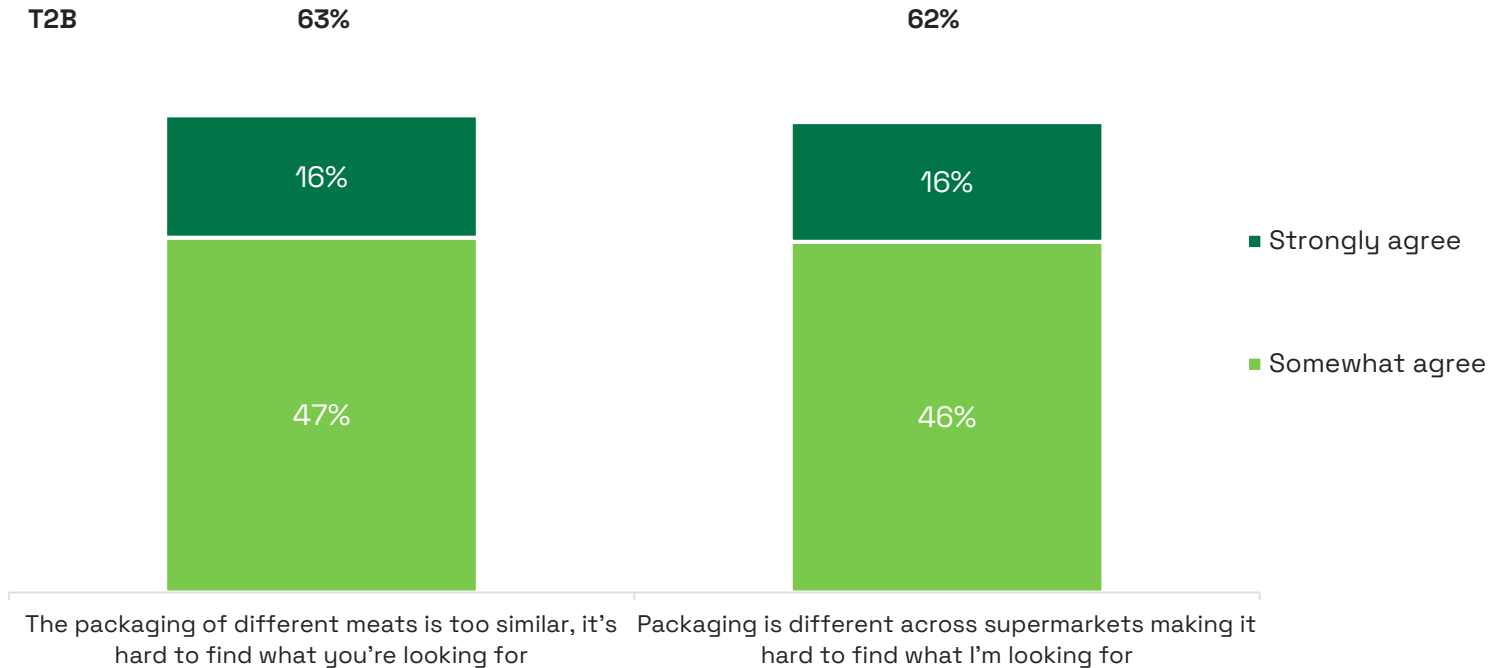


# Colour codes

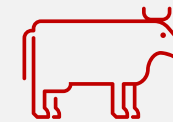
# Many believe the packing of meats is too similar, making it hard to find what they're looking for when shopping.

A further 62% feel that different packaging between supermarkets makes it hard to find what they're looking for.

## Extent you agree with each statement...



## Most Associated Colours (Top 2) | Spontaneous



79% Red  
10% Brown



46% Red  
15% Green



46% White  
13% Pink

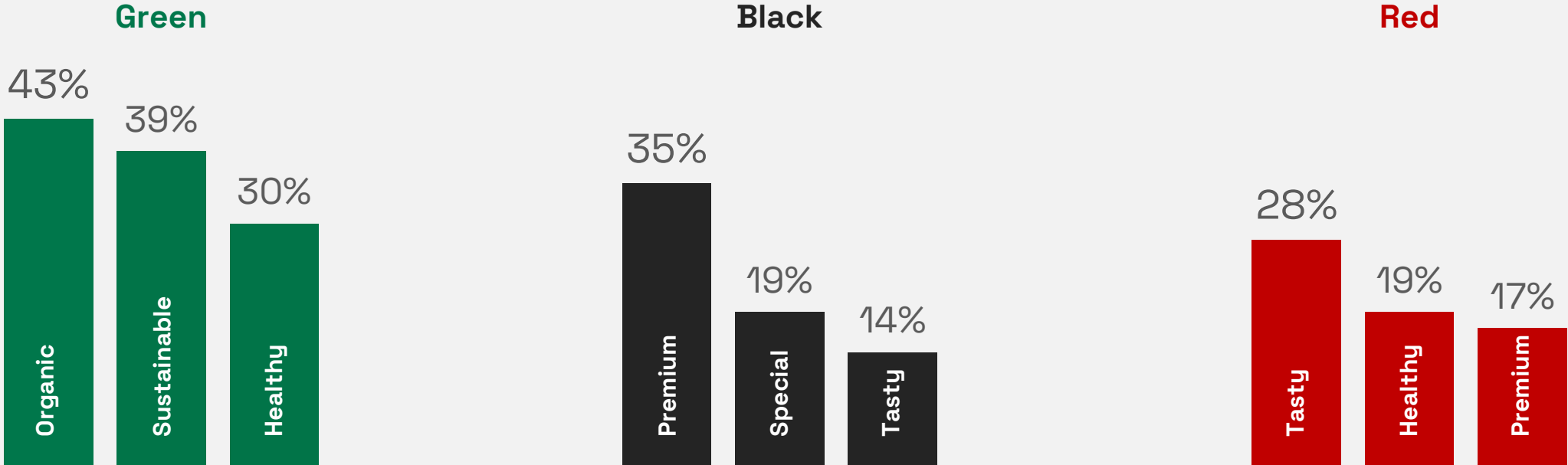


57% Pink  
14% White

Each colour does align to specific attributes across meat types, with green standing out the strongest for organic and sustainable cues.

Black is most closely associated with premium while red is most closely associated with taste.

Top 3 associations for green, black and red



With some confusion about colour associations, there is an opportunity to utilise colours to convey specific messaging.

## Thought Starters:

### Distinction is key

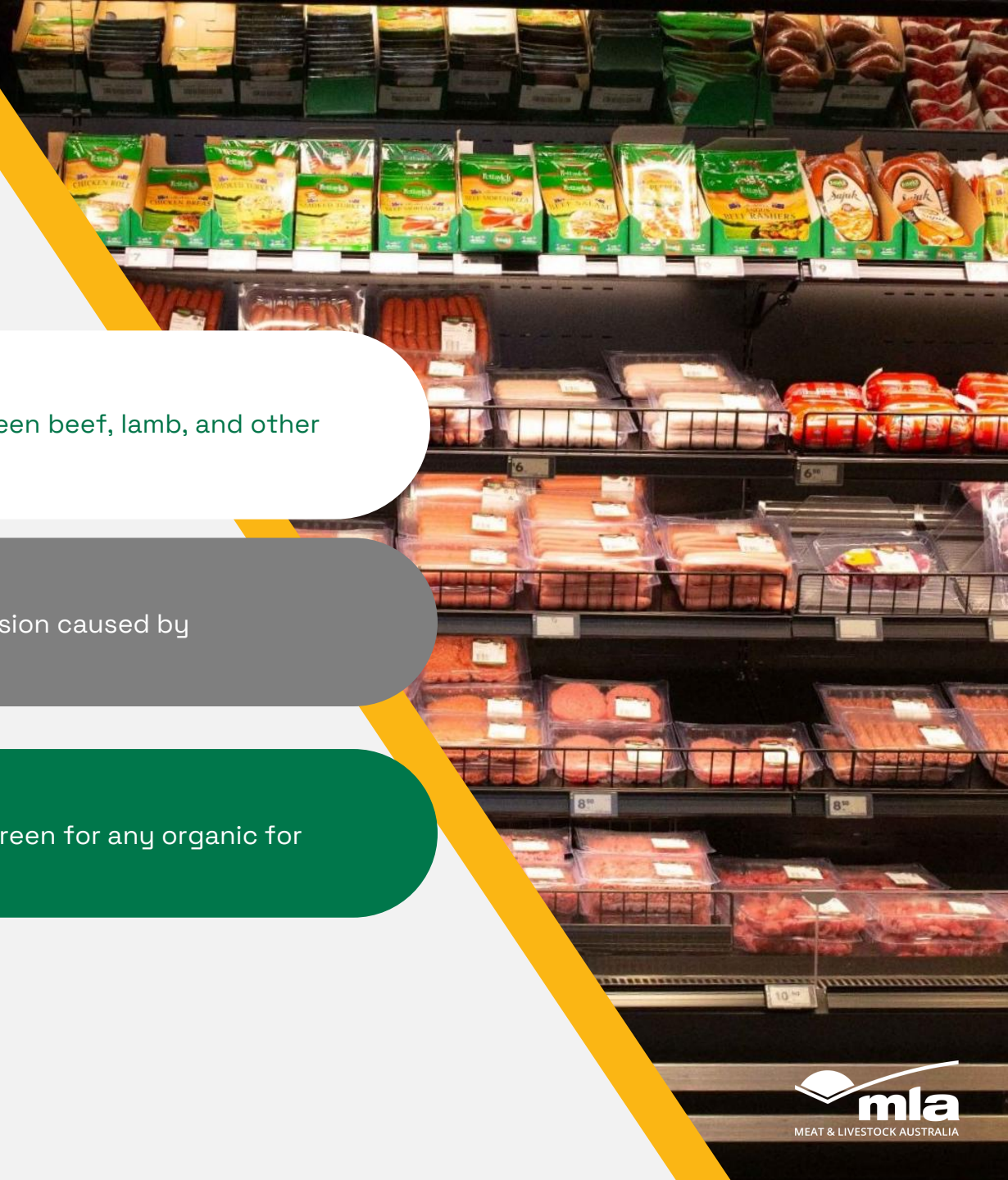
Where possible, use distinct, consistent block colours to differentiate between beef, lamb, and other meats across all packaging and product ranges.

### Standardisation to avoid confusion

Work towards standardising colour cues across products to minimise confusion caused by inconsistencies between supermarkets.

### Colour as a cue

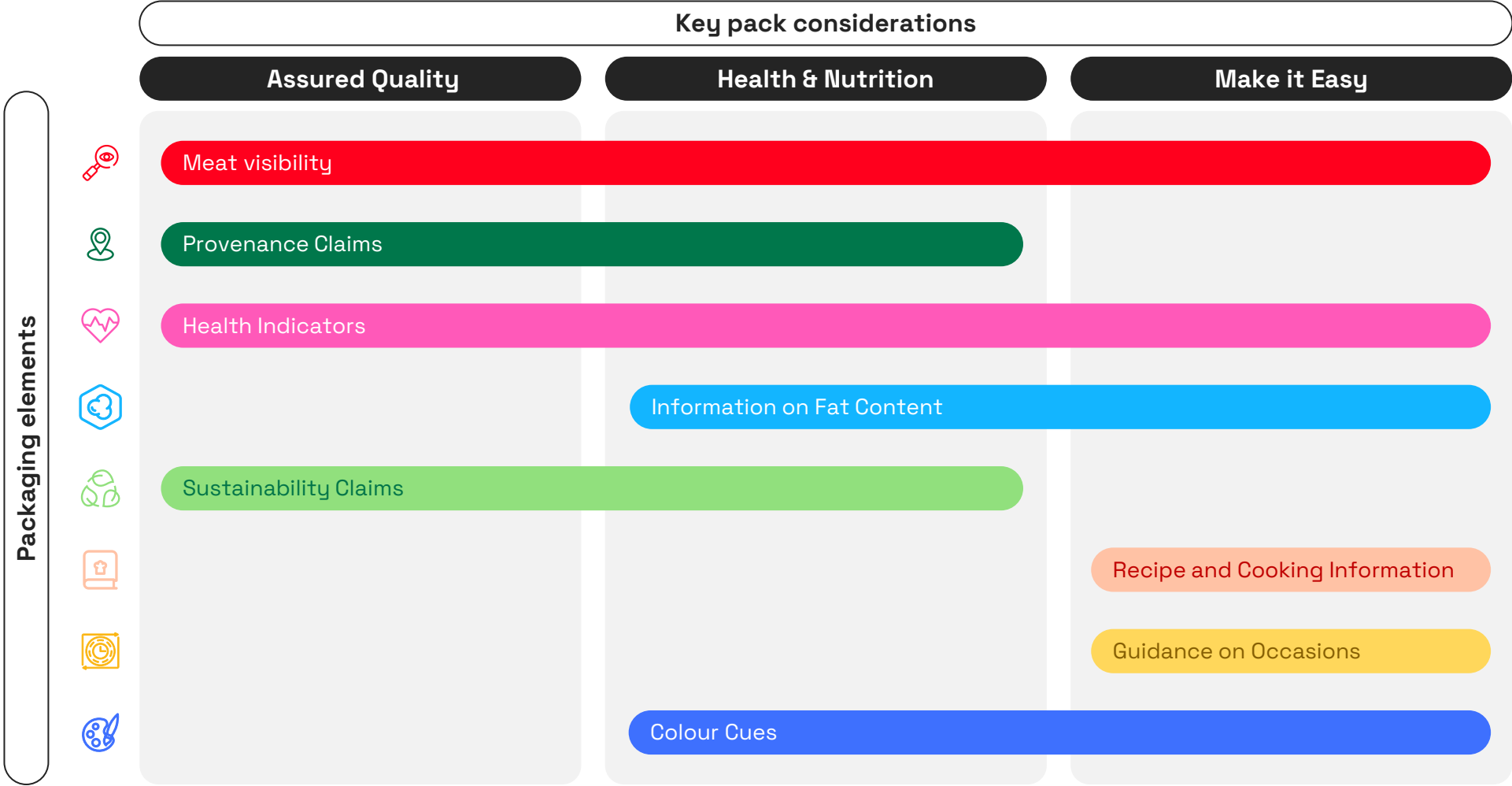
Highlight specific product attributes using strategically chosen colours – green for any organic or sustainability cues, black for premium associations and red for taste.





# Summary

Whilst priority packaging elements exist, each serves multiple functions, and the appropriate combination should be picked based on your brand, objectives and audience



## To recap:

The elements that really matter when it comes to meat packaging



**Visibility & packaging**



**Provenance & sustainability**



**Health benefits & transparency**



**Meal & occasion inspiration**



# Questions & Discussion